



CERS Business User Guide

This guide has been developed by the California Environmental Reporting System Business User Group in cooperation with CAL/EPA to assist businesses using CERS.

Table of Contents

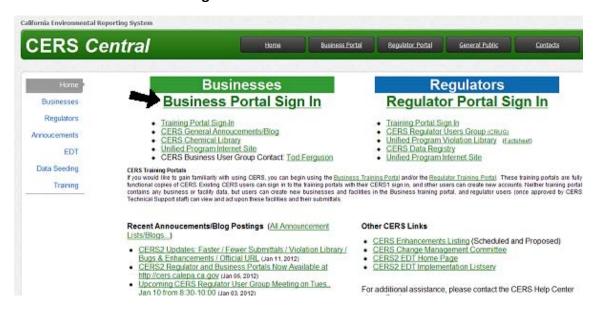
- 1. Getting Started
 - i. Create an Account
 - ii. Add Facility
 - iii. Entering Chemical Inventory
- 2. Managing Business Organizations
 - i. Users & Account
 - ii. My Business
- 3. Helpful Tips
 - i. Getting Help
 - ii. Tools
 - iii. "Home" page
 - iv. Web Browsers
 - v. Printing
- 4. CERS Conditions of Use

1. Getting Started

I. Create an Account

First time users, please visit CERS home page @ http://cers.calepa.ca.gov/

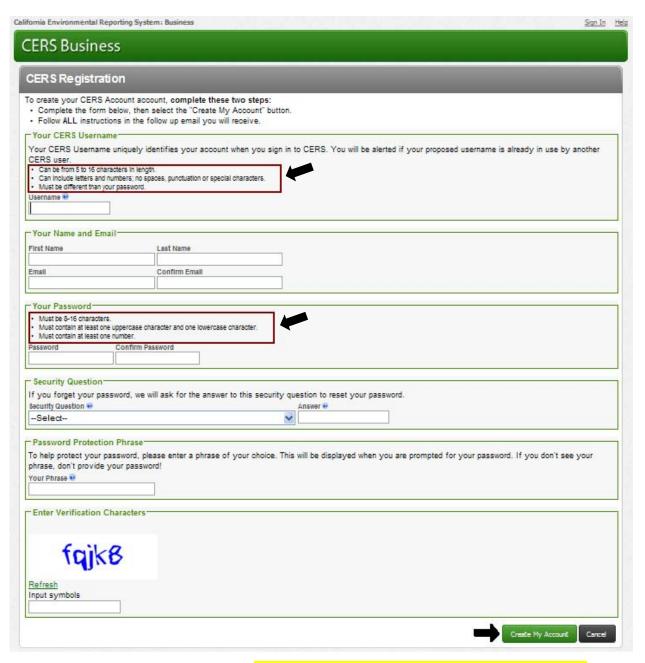
a. Select "Business Portal Sign In"



- b. "Watch Demo Video" before proceeding to create a New Account.
- c. Now select "Create New Account"



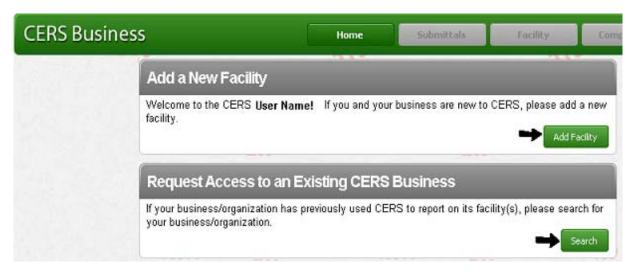
- d. Fill out CERS Registration and select "Create My Account"
 - i. Make sure the username and password meet the requirements in the red box.



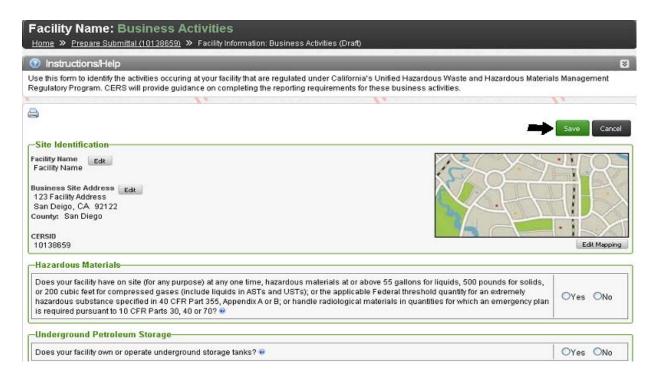
ii. You should receive an automated email message to activate your account. If you do not receive one, check your spam or junk folder. Make sure to follow the instructions on this email to activate your account.

II. Add Facility

Once the account is activated, user can sign in and add a new facility by selecting "Add Facility" or request access to an Existing CERS Business by selecting "Search"

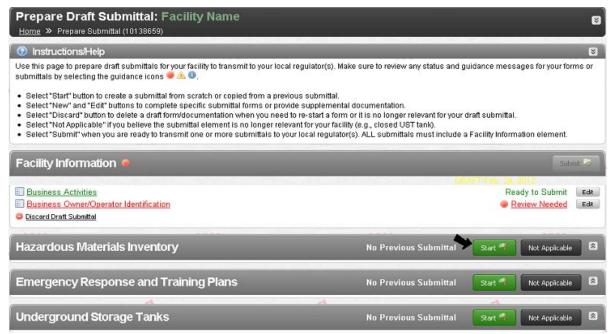


- a. If a facility exists, select "Search"
 - i. When User requests access to a facility, it will need a Regulator to approve or authorize access. The Regulating Agency may request verification prior to access for Lead Users. Allow some time delay for this process.
 - ii. Business with facilities in more than one CUPA will be handled by Cal/EPA in accordance with their current practices of requiring written requests and validation from the business.
- b. If selected "Add Facility", follow these steps:
 - i. Provide Address
 - ii. Provide Facility Name
 - iii. Select "Continue" after facility has been added to CERS
 - iv. Complete questions for <u>Business Activities</u> and select **"Save"**. This questionnaire helps determine which submittal elements will be required for your facility.
 - v. Fill out <u>Business Owner/Operator Identification</u> and select **"Save"**. Do not submit your Facility Information submittal element until you are ready to submit the Hazardous Materials Inventory. CERS requires that the Facility Information be submitted with any other submittal element.

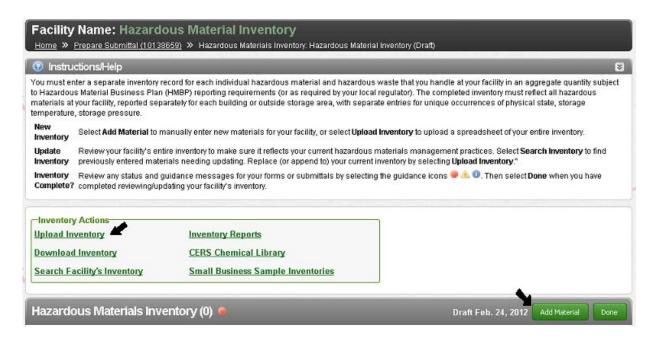


III. Entering Chemical Inventory

Even if your facility is in a jurisdiction that requires reporting hazardous materials below the state thresholds, you can use the HMIS submittal element to meet these requirements by electing "Start".



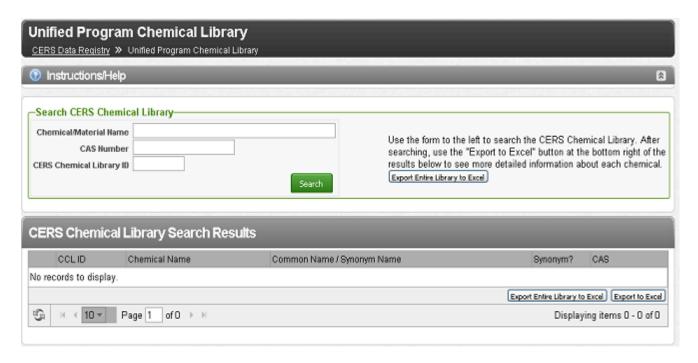
a. If your facility has many different hazardous materials, you should select "Upload Inventory" and be sure to use the <u>CERS Hazardous Material Inventory Upload Template</u> (http://cers.calepa.ca.gov/Tempdocs/Seeding/InventorySeedTemplateNov2011.xls). Copy and paste your data into the template. This will avoid many unnecessary errors.



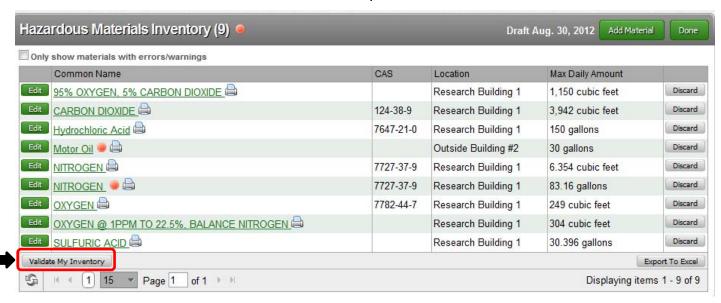
- i. The file size limit is 500 inventory items can be uploaded at a time.
- ii. If an inventory were to exceed those limits, you would need to cut up their excel files into separate chunks of about 200 chemicals, then use the <u>"Append to Existing Inventory"</u> function on the upload page to run the various uploads.
- iii. Of course all of the files need to include the column headings or the upload will be rejected.



b. Note that not all Users will have the capability to upload their inventory. Refer to point "c" below to manually enter your information.



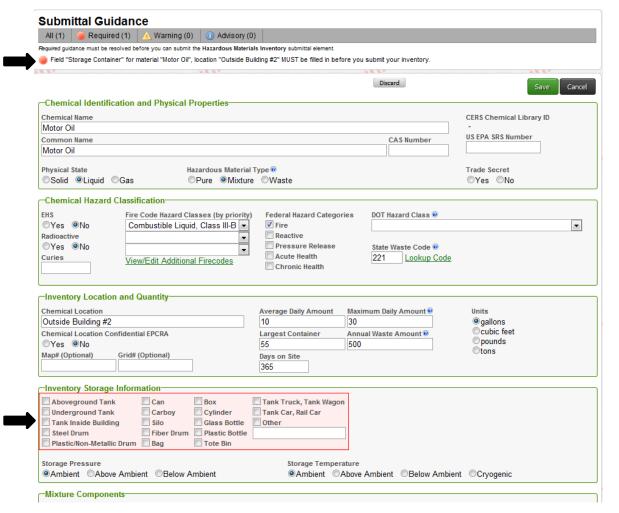
- c. If facility only has a few hazardous materials, it is recommended to add them manually by selecting "Add Material". Simply use the CERS Chemical Library to search for the material and select "Add" when material is found.
 - i. If the material is not found in the CERS Chemical Library, select "Unable to Find Material/Add New Chemical" to add your material to your inventory.
 - ii. There is no difference in the upload process for materials that are or are not in the CERS Chemical Library. CERS would not reject a submittal bases on inconsistency with data in the Chemical Library.
- d. To check the validity of your inventory data, click "Validate My Inventory" at the bottom of the Hazardous Materials Inventory window.



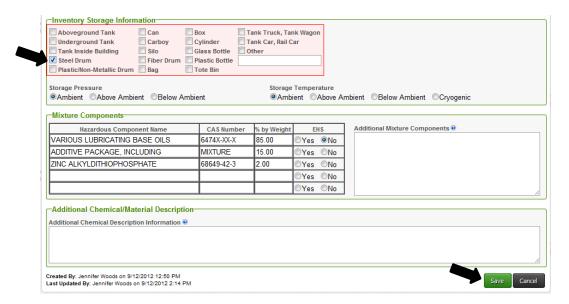
i. Note any guidance icons [= Required; = Warning; = Advisory] that appear next to line items. If you have a larger inventory spanning several pages, check the box "Only show materials with errors/warnings" to view just the flagged items.



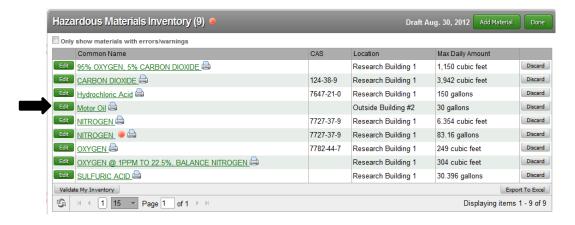
ii. Click the green "Edit" button next to the line item you wish to make revisions to. At the top, you will see the guidance icon next to a brief summary of why the data has been flagged. Specific field(s) in the chemical profile that require further review will be highlighted in red.



iii. In the example above, the profile for "Motor Oil" is flagged because it is missing information about its storage container (the "Inventory Storage Information" box is highlighted in red). To correct this error, check the appropriate box that denotes how your motor oil is stored and click "Save."



iv. Once the appropriate fields are corrected and you click "Save," the guidance icon will disappear from your inventory list. Once "Steel Drum" is selected as the container for "Motor Oil", the updated inventory lists now only flags "Nitrogen" and not "Motor Oil":



- e. Next, upload "Site Map" to complete the Hazardous Materials Inventory section.
 - Note that there are other options to complete the submission, especially for those facilities that do not require site map.
- f. Under Emergency Response and Training Plans, select "Start" to upload files
- g. If facility has Underground Storage Tanks, select "Start" and answer the questions. Select "Save" when finished.

2. Managing Business Organizations

- Organizations allow a set of users to manage multiple facilities owned/operated by single business. Organizations typically are corporations or other legal entities with multiple facilities.
- Every facility belongs to only one organization.
- Every CERS2 business user must be associated with at least one organization.



I. User Accounts

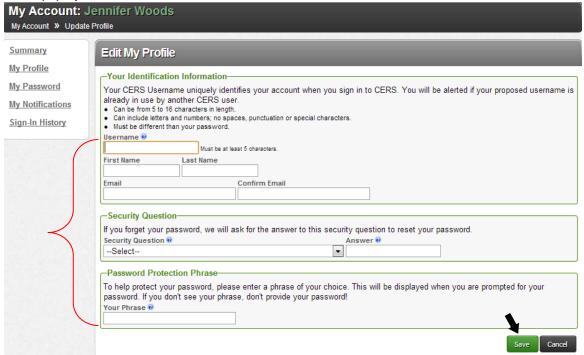
- a. If you are an existing user and you cannot login, select <u>"Forgot your username"</u> and enter the registered email. If you have your correct username, you can select <u>"Forgot your password"</u>. You should then receive an email on how to reset your password.
- b. Be sure to keep username, password, and also the security question somewhere safe in case it slips your mind.
- c. To change your account information (i.e., username, first & last name, email address, security question and answer, password and password protection phrase):
 - (i) Click on "[Your Name]'s Account" at the top of the CERS Business Home page.



(ii) Click on "Edit My Profile" (for username, name, email, security question or phrase) or "Edit My Password" (for password only)

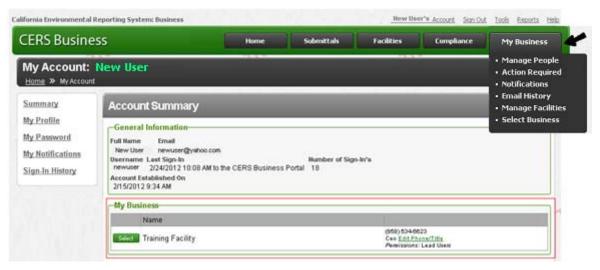


(iii) Update desired fields and click "Save"



II. My Business

Go to "My Business" located at the top right corner of the page and select one of the options you wish to manage.



a. Manage People

A user can belong to multiple Organizations (e.g., consultants)

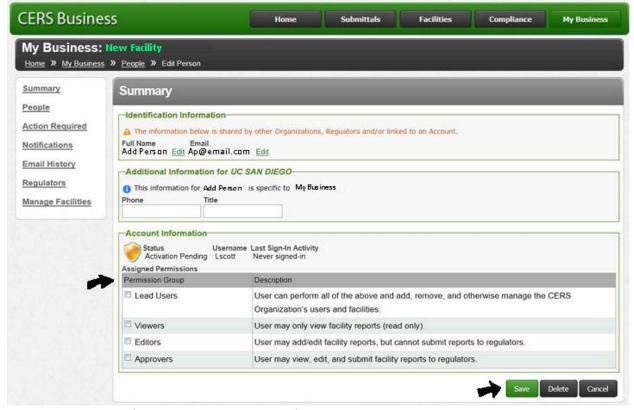
A user's security rights applies to ALL facilities associated with an Organization

Viewer: View facility information (read only)

Editor: View/edit facility information (no submit)

Approver: View/edit/submit facility information

 Lead User: View/edit/submit facility information plus manage the Organization's users.



- Select an existing user to edit
- ii. Select "Add Person" to add someone to your Business. Enter their email and select "Continue". Then, enter their full name and their phone number and title if possible. Be sure to check a role under "Permission Group" for this person and select "Save" when finished.
- iii. Select "Delete" to delete an existing user
- iv. As a consultant, you can be added as a user to as many business organizations as necessary but CERS cannot create an organization for you as your facilities are not owned by your firm. As their consultant, they would add you (or they could request us to add you when they first create their organization) as a user with Editor, Approver, or Lead User permissions, depending on their needs and your services.

b. Manage Facilities

Facility Transfer

You can request your regulator to approve transferring one of your facilities to a different business. This is normally used to help businesses aggregate all of their reporting facilities under a single CERS business, typically because of changes of ownership or duplicate business records.

a) This allows you to place facilities into your organization that are currently not associated with your business. For example, there are many facility files that were migrated over from CERS1 (and Unidocs before that). These were all migrated as is, so they were assumed by CERS1 to be a business with only one facility. You could now transfer the files that are not currently in your business organization to the correct organization.

ii. Merge Facilities

You can request your regulator to approve merging duplicate facilities' records for your business if reporting/submittals have already been performed on one or both facilities. Facilities can only be merged into another facility for the same business/organization.

iii. Delete Facilities

You may request that your regulator delete a facility if you have never reported on this facility. Facilities with submissions would normally be merged into another facility. Contact your facility's local regulator if you have an unusual situation that can't be handled using the Transfer, Merge, or Delete options described on this page.

iv. Archived Facilities

View any facilities previously reported in CERS by your business but which are now owned/operated by some other business. This would normally be facilities transferred out of your business at your request or by your regulator due to a owner/operator change for the facility.

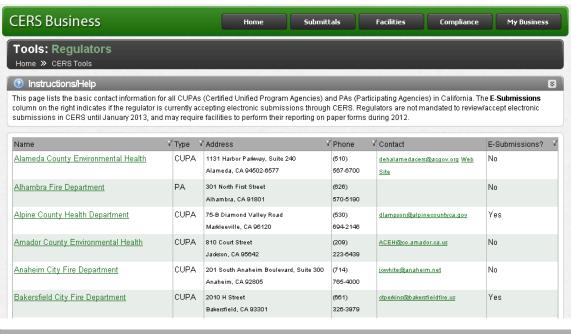
c. Select Business

- a) To add a new Business organization, click "Select Business" from the "My Business" drop-down menu.
- b) In the next window, click the button "Add a new facility/business"

3. Helpful Tips

I. Getting Help

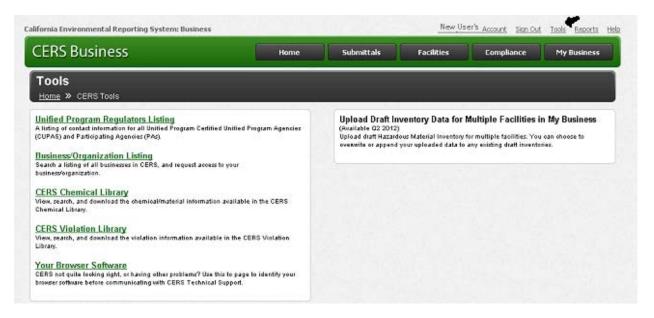
- a. CERS Business website is an interactive online managing tool. Users often need to correspond with certain requirements in order to proceed. Make sure to check emails and notifications and complete the required tasks.
- b. Two most useful tools at the bottom of the website:
 - o Request Technical Assistance: cers@calepa.ca.gov
 - o Local regulator(s): https://cersbusiness.calepa.ca.gov/Tools/Regulators



Technical Assistance Request In order for us to provide those most effective and efficient service, please fill out the form below. Please include as much detail as possible about a problem or issue you are having, including any peritinent information (CERSID's, Regulator Name, Submittal Element, Business Name, etc). Help Ticket Information Your Name Your Email Address Your Username Tod Ferguson tferguson@ucsd.edu tferguson@ucsd.edu Current Url https://cersbusiness.calepa.ca.gov/Tools/Regulators Current CERSID 10154999 Your Browser Information Firefox 3.0 on WinXP Phone Number (optional, if you want to be called back) Issue Description (Be specific please) Submit Cancel

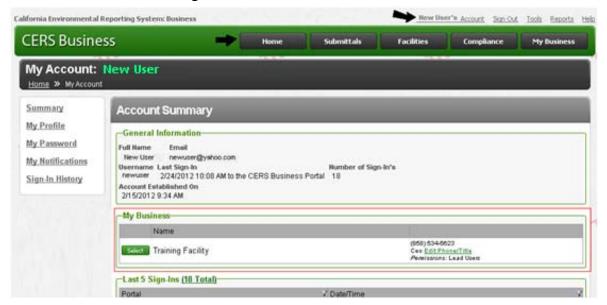
II. Tools

- a. Be sure to check out 'Tools" at the top of the page for help.
- b. Be sure to contact your local CUPA first to answer questions or resolve problems. If they cannot help, they can forward your question/problem via email to the CERS Help Center.



III. <u>"Home" page</u>

- a. If user has two or more business organizations, select <u>"User's Account"</u> on the top right corner to view all <u>business organizations</u>. These users would typically be consultants with multiple clients.
- b. When inside a business organization, selecting **"Home"** will take you to the <u>facility</u> within that business organization.

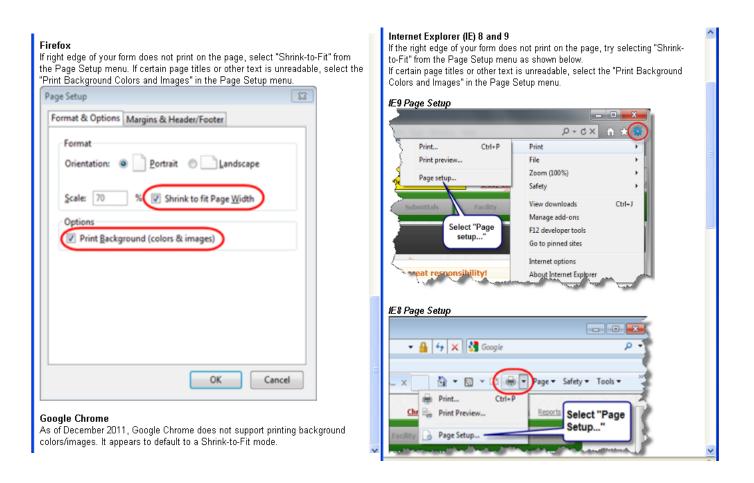


IV. Web Browsers

CERS is designed for standard-sized screens using relatively current web browsing software (e.g., Internet Explorer 8+, FireFox 3.6+, current versions of Google Chrome or Safari). Some CERS features may not work on older browsers, and CERS is not designed to be effectively used on smaller display devices (e.g., mobile phones, etc.).

V. Printing

- Viewing and printing some CERS reports requires relatively current PDF viewing software (Adobe Reader 8+).
- b. Click on printing icon and on the left side for CERS Printing tips if needed.
- c. To print inventory files and other submitted forms, go to the page that you want to print, Select "File" on left top corner and select "Print". Before printing, it's helpful to select "Print Preview" to see what you will get when you print. If the page does not show correctly the way you want it to be printed, select "Page Setup" under "File" and check the setting that is compatible with your browser and printer.



4. CERS Conditions of Use

- ✓ I agree to <u>protect my CERS Account password and not share it with others</u>. If my account is compromised, I will contact CERS Technical Assistance: <u>cers@calepa.ca.gov</u> immediately.
- ✓ I understand when I am using the training version of CERS that any data is not permanently retained or backed up, and CANNOT be moved into the production version of CERS.
- ✓ I understand any data in the training version of CERS is publicly available (to facilitate learning opportunities for myself and other CERS users), so I should not enter sensitive facility data into the training version of CERS.
- ✓ I will only upload documents as required by CERS or my local regulator(s). Any document I upload will be as compact as possible, will not exceed 25MB is size, and will be free from viruses or other malicious elements.
- ✓ I understand I should NOT use my web browser's "Back" button while using CERS--doing so may result in duplicate records or other problems.
- ✓ I understand that CERS is designed for standard-sized screens using relatively current web browsing software (e.g., Internet Explorer 8+, FireFox 3.6+, current versions of Google Chrome or Safari). Some CERS features may not work on older browsers, and CERS is not designed to be effectively used on smaller display devices (e.g., mobile phones, etc.).
- ✓ I understand viewing and printing some CERS reports requires relatively current PDF viewing software (Adobe Reader 8+).
- ✓ I understand CERS is generally available 24 hours a day except 1) the last Thursday of the month from 2-3pm, 2) occasional Saturday mornings, 3) other planned times noticed in advance on the CERS home page.
- ✓ **Facility** "Unified program facility" means all contiguous land and structures, other appurtenances, and improvements on the land that are subject to the requirements listed in subdivision (c) of section 25404 of the Assembly Bill No. 2286.
- ✓ **Organization**-The "Organization" entity is a new CERS concept allowing businesses and/or regulators to manage a group of one or more users (CERS-Keys) to administer a collection of one or more facilities. Organization is roughly synonymous with the term "Business" although Organizations can also be government agencies, non-profit organizations, and other entities that own/operate regulated facilities.

✓ **Chemical Location** (inventory field 201) - Building or outside/adjacent area where hazardous material is handled. A chemical that is stored at the same pressure and temperature, in multiple locations within a building, may be reported on a single page. NOTE: This information is not subject to public disclosure pursuant to HSC 25506.